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Foreign Crops and MARKETS



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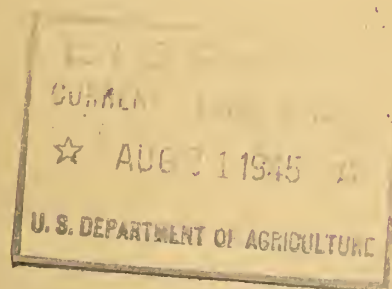
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AUGUST 6, 1945



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L A T E C A B L E S

Czechoslovak cotton mills can put into operation immediately 2.9 million spindles, despite rumors to the effect that many of the textile mills had been destroyed or moved to other areas by the Nazis. This would represent a loss of only 300,000 from the prewar (1938) capacity of 3.2 million spindles. Of the total number of spindles, 1.3 million are in the Protectorate and 1.6 million in the Sudeten. If the 2.9 million spindles are put to work at 48 hours per week they will require 6.6 million kilos (30,400 bales of 478 pounds) of cotton per month, it was stated. All of the spindles can use "good middling" American cotton.

Britain has revised its 1946 agricultural production goal in the light of the prospective world supplies in the 1946-47 crop year. The Ministry of Agriculture announced that it would not be possible to allow as much freedom in cropping in the United Kingdom in 1946 as was expected. The War Agricultural Executive Committees were instructed to obtain in 1946 approximately the present (1945) acreage of potatoes and sugar beets. There is to be no reduction in the overall average prices for these two crops, or in the acreage payment for potatoes. While there will be a reduction in the acreage payments for wheat, the Ministry asked farmers to sow all suitable land to wheat and rye in the coming autumn, and to do their best to obtain a wheat area of 2.5 million acres. Preliminary estimates indicate that the total area under wheat this year is 2,350 million acres.

The Argentine Government announces a flaxseed price of 17 pesos per 100 kilograms (\$1.285 per bushel) for grade 2 for the 1945-46 crop year delivered at Buenos Aires.

Danish crop conditions as of July 15, 1945, corresponding figures for the same date last year being shown in parentheses, were reported in percent of normal as follows: Wheat, 95 (100); rye, 92 (98); barley, 96 (100); oats, 97 (99); mixed grain, 97 (99); legumes, 98 (99); potatoes, 94 (91); mangels, 90 (82); fodder sugar beets, 90 (82); rutabagas, 95 (95); turnips, 94 (94); carrots, 92 (90); sugar beets for feed 91 (83); sugar beets for sugar, 94 (89); lucerne, 98 (96); sown hay, 101 (111); wild hay, 93 (97); and pastures, 100 (104).

Cuba has prohibited the use of canned milk except for direct human consumption. This measure was adopted because of the shortage of canned milk. The prohibition makes illegal the use of condensed or evaporated milk as a raw material in the manufacture of any kind of product, as well as its consumption and sale in cafes, restaurants, and hotels. Manufacturers of food products as well as cafes, restaurants, and hotels may use only powdered, raw, or pasteurized milk. Condensed milk factories are obliged to maintain a reserve of 20 percent of their production, subject to disposition under orders of the Office of Price Regulation and Supply.

August 6, 1945

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS, AND FEEDSCUBA EXPECTS SHARPLY REDUCED
CORN CROP; IMPORTS NEEDED

The unfavorable outlook for the main corn crop in Cuba is expected to show a sharp reduction from early season prospects, as well as from normal. As a result of extensive damage from drought, the Cuban Government on July 18 published a decree waiving import duties on up to 30 million pounds of corn (about 536,000 bushels) during the subsequent 4-month period, in an effort to meet the increased demand for corn resulting from severe shortages of other domestic foods.

The drought, which lasted from October to late June, made replantings necessary and caused considerable crop failure so that the area harvested will be much below average. Yields are also expected to be smaller than average as a result of the drought. In addition, insects caused considerable damage. The principal or summer crop, harvest of which will begin around August 15, ordinarily comprises about 75 percent of the total. No reliable forecast of the summer crop is available, but some estimates place the harvest as low as 1.8 million bushels, compared with normal harvests of around 4.5 million bushels. While the outturn is generally expected to exceed the low figure, the harvest is conceded to be far below the country's requirements.

In addition to the smaller-than-average outturn expected for corn, there is a critical scarcity in other domestic foods, notably root crops and vegetables. A shortage of imported rice is also expected to be felt in August and September. To relieve this imminent scarcity of food, the Government took the present action to facilitate corn imports, a small part of which is expected to come from the Dominican Republic. The Government hopes that imports will curb speculation in the small new crop, and will thereby act as a stabilizing influence on corn prices. Offers considerably above the ceiling price of \$3.62 per 100 pounds in Habana have already been made for corn in the field, according to reports.

The Government is endeavoring to stimulate increased fall planting for the winter crop in order to partly offset the reduced summer crop. A scarcity of seed of suitable varieties for growth under semi-tropical conditions is said to be a handicap to that program.

UNITED KINGDOM'S BREAD GRAIN
ACREAGE REDUCED

The United Kingdom's bread grain acreage in 1945 is only about 75 percent of the 1944 seedings, according to a recent estimate of the

Ministry of Agriculture. The current wheat acreage, reported at 2,355,000 acres is the smallest since 1941, though it is still considerably above the prewar average. Wheat acreage reached an all time peak of 3,461,000 acres in 1943, but was only slightly smaller in 1944, when it was placed at 3,220,000 acres.

The condition of the wheat crop on July 1 was placed at 91.9 percent of normal, compared with 92.6 percent a year ago, when the yield per acre was about 36.4 bushels. Based on the acreage and condition reports, a crop of approximately 85 million bushels might be expected, making prospective production as well as acreage the smallest since 1941. The rye acreage is reported at 94,000 acres compared with the revised figure of 127,000 acres a year ago. (See Foreign Crops and Markets, December 4, 1945.)

BURMA'S RICE SURPLUS REDUCED BY WAR

Burma's rice surplus available for export this year to nearby countries is tentatively estimated at about 1 billion pounds, or only 15 percent of the 1936-1940 average for prewar exports of 6.5 billion pounds annually, according to a preliminary report from Rangoon. In the 3-year occupation period, the Japanese exported a total of about 1 billion pounds of rice from Burma, and annually demanded 670 million pounds for use in Burma, the despatch stated.

Since there was no inducement for farmers to grow rice on the prewar scale after Burma was invaded, the acreage declined from 12.4 million acres in 1941-42 to 7.2 million in 1943-44, and gained slightly in 1944-45 as a result of measures taken by the Government to increase the acreage. Rice production in 1944-45, therefore, amounted to about 225 million bushels, according to Burmese Government officials under Japanese control. At this figure, the 1944-45 output shows a decline of 40 percent less than the average production of 350 million bushels annually from 1936-37 to 1940-41.

The 1945-46 rice harvest has not yet been forecast, but it is expected to be far less than former production. The liberation of lower Burma came at a time when farmers usually prepare the rice fields, and several factors limited the acreage which will be harvested principally during next December and January. General disorganization, lack of equipment, inadequate transportation, shortage of work animals, and the existence of old stocks on farms in lower Burma are factors which may have influenced some planters to grow only the amount that was considered necessary for their own requirements.

Of the Burman rice exports during the 1936-1940-average prewar period, 3.5 billion pounds was shipped to India, 800 million to Ceylon, and 500 million to British Malaya. Exports of 625 million pounds were sent to Europe, about 120 million to Africa, and 100 million to the Caribbean area (see OFAR's report, World Rice Production and Trade, April 1945).

PANAMA FACES ACUTE RICE SHORTAGE

The present shortage of rice in Panama is expected to be critical before the September-October harvest. Import requirements from August through October are estimated at 6 million pounds, but rice imports are practically unavailable, since small crops have sharply reduced supplies in exporting countries this year.

VEGETABLE OILS AND OILSEEDS

SOYBEAN CULTIVATION ENCOURAGED IN FRANCE

Although production of soybeans in France is on a small scale at present, their cultivation has been officially recognized by the provisions of a resolution, effective in July 1945, that permits farmers who must deliver specific amounts of vegetable oilseeds to the Government to fulfill such obligations in whole or in part with soybeans.

Soybeans were not commercially produced in France until 1943 when about 2,500 acres were grown in family gardens for food and another 5,000 for livestock feed. The figures for 1944 were 6,000 and 8,500 acres, respectively. Estimated acreages for the current season are approximately the same as those of last year. Unsatisfactory weather conditions in 1944 reduced the yield per acre and producers lost some of their enthusiasm.

FRANCE: Soybean imports, 1938 with comparisons

Country of origin	Average 1934-1936	1937	1938
	<u>Bushels</u>	<u>Bushels</u>	<u>Bushels</u>
Manchuria	743,777	987,220	254,683
United States	114,120	91,789	231,374
Other countries	3,755	15,057	13,278
Total	861,652	1,094,066	499,335

Compiled from official sources.

Total production of soybeans has not been officially estimated. Apart from those grown in gardens and consumed directly in the household the 1944 crop may have been from 75,000 to 100,000 bushels. While it is expected that production may increase some during the next few years, it is doubtful if the output will ever reach any sizable proportion. Under normal conditions, soybeans could be imported from the Far East much more cheaply than they could be grown in France. During the years 1933 to 1937 imports of soybeans averaged 850,000 bushels, coming chiefly from the Far

East. The United States, however, supplied 46 percent of the total in 1938. Soybean oil; imported from other European countries, averaged about 4 million pounds annually.

ECUADOR PLANS TO EXPAND LINSEED OIL PRODUCTION

Plans, specifications, and estimates have been obtained for construction of a linseed oil factory in Quito, costing about 400,000 sucres (\$29,049). The building of this plant is expected to stimulate further interest in domestic cultivation of flaxseed and production of linseed oil, according to the Ecuadoran Ministry of Economy.

Although very little flaxseed is grown domestically at present, extensive regions are satisfactory for its cultivation, and expansion of this new industry would be of considerable value to the country. Plans are being formulated for the establishment of agricultural cooperatives for the growing of flaxseed with central factories for the extraction and preparation of oil. The proposed plant should be of a size adequate to crush 1 ton of seed daily, a quantity that should be sufficient to meet the local demands of the country. As the industry expands, additional factories could be constructed in other sections, with the prospect of eventually creating an exportable surplus.

During recent years, Ecuador has imported an average of about 100 tons of linseed oil annually. Since 1941, Argentina has been the chief source of supply. Linseed oil in Ecuador is utilized chiefly in the paint industry.

INDIA'S RAPE AND MUSTARD SEED ESTIMATES

India's final rape and mustard seed estimates are reported as 5,827,000 acres and 1,197,280 short tons for 1944-45, as compared with 5,364,000 and 1,031,520, respectively, for 1943-44. Although the present acreage shows an increase over that of last year, there is a decrease of 2.2 percent from the harvested area of the 5 preceding years. This year's production represents an increase of less than 1 percent over the average harvest for 1940-1944. Practically the entire production is consumed within the country.

FRUITS, VEGETABLES, AND NUTS

DECIDUOUS FRUIT PRODUCTION SHOWS SHARP DROP IN MEXICO

Due to frosts and drought extending over the entire Republic, the 1945 production of deciduous fruit in Mexico will be one of the poorest in years, with decreases of 25 to 50 percent, as compared with 1944 production, and in the case of plums, as much as 60 percent. Mexico, compared

to the United States and many other countries, is not a large producer of deciduous fruit, but plantings in the last 5 years have been on a relatively large scale. Despite the increased production in recent years, Mexico imports nearly all types of deciduous fruits, with apples and grapes being the most important from the standpoint of value.

MEXICO: Production and imports of principal fruits,
1941-1944

Year	Apples		Pears		Peaches		Grapes	
	Pro- duction:	Imports	Pro- duction:	Imports	Pro- duction:	Imports	Pro- duction:	Imports
	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000	: Short	: Short
	: bushels	: bushels	: bushels	: bushels	: bushels	: bushels	: tons	: tons
1941 ...	2,021	74	514	5	2,003	0.6	18,655	1,305
1942 ...	1,729	62	506	7	1,987	1.1	21,611	1,025
1943 ...	1,769	59	489	12	1,899	.9	24,802	1,001
1944 ...	1,790	87	580	14	2,218	1.1	a/	1,295

Compiled from official sources.

a/ Not available.

DENMARK RELEASES
SEEDS FOR EXPORT

The Danish Government, according to information received from United States representatives in Copenhagen, has released for export the following quantities of seed from the 1944 crop, all tested for high purity and germination, in pounds: orchard grass, 1,146,000; late perennial ryegrass, 397,000; Italian ryegrass, 1,874,000; meadow fescue, 639,000; bromus arvensis, 198,000; poa trivialis, 364,000; timothy, 419,000; black mustard, 441,000; mangel, 1,102,000; and sugar beet, 353,000.

TOBACCO

ITALY AIDS
TOBACCO PRODUCERS

A recent decree of the Italian Government, apparently intended to encourage production of leaf tobacco through the sale of which the Government obtains considerable revenue, authorizes financial assistance to tobacco growers for the replacement and repair of buildings damaged during war. Growers who deliver tobacco to the Monopoly may receive grants to be paid in annual installments totaling 80 percent of the reconstruction costs, after the work has been approved by the proper authorities. The sums will be paid as an addition to the price of leaf delivered to the Monopoly. Over and above official prices, growers who suffered directly from the war may receive up to 18 percent of the appraised value of their crop as a special bonus to be paid for 5 years beginning in 1945. Growers whose baled tobacco has been totally, or almost entirely destroyed, will be compensated in amounts equal to 90 percent of the assumed value of their product.

COTTON AND OTHER FIBERS**BRAZIL'S COTTON CROP
REDUCED BY HALF**

The 1944-45 cotton crop in south Brazil, picked during March to July, was severely curtailed by drought at planting time, excessive rain during most of the growing and picking season, and heavy insect damage. Private estimates of the Sao Paulo crop vary widely from 800,000 to 1,050,000 bales (of 478 pounds), compared with the record crop of 2,136,000 bales in 1943-44. Production in other states of south Brazil probably did not exceed 50 percent of the 1943-44 crop of 100,000 bales. The 1944-45 crop in north Brazil was estimated unofficially at 400,000 bales making a total for all Brazil of 1,250,000 to 1,500,000 bales against 2,725,000 for 1943-44. The 1945-46 cotton crop in north Brazil, picked during August to January, is expected to equal about 460,000 bales.

Accurate estimating at this time of the season is difficult due to the fact that practically all of the Brazilian crop is purchased in the seed by ginners direct from the growers and a large part of it is stored in this form for 1 to 9 or 10 months. Ginning is not completed until about the beginning of the next season (March 1), and there is no official organization authorized to collect statistical data on unginned cotton or make forecasts concerning the entire crop before ginning is completed.

The quality of the south Brazil crop, as well as the quantity, was greatly lowered by weather damage this year. The quantity classified in the State of Sao Paulo prior to June 15, 1945, was only one-third as large as during the same period a year ago and less than 14 percent of it was better than Type 5 compared with 59 percent in 1944. Cotton exports from Brazil during the first 5 months of 1945 totaled only 141,000 bales compared with 255,000 for a similar period in 1944. The United Kingdom accounted for 77 percent of the 1945 total and 66 percent in 1944.

Prices quoted at Sao Paulo for Type 5 have fluctuated since the middle of May around 90 cruzeiros per arroba (14.82 cents per pound), which was nearly 5 cents less than the export price of American cotton of comparable quality. An export tax and other handling charges in Brazil, however, reduced this difference to less than 2 cents per pound. A recent rise in prices of Brazilian cotton has further narrowed this difference to around 1 cent. The continued scarcity of shipping space is the principal factor retarding the export movement of Brazilian cotton.

**MEXICO IMPOSES SALES
TAX ON IXTLE**

A tax on all first-hand sales of "ixtle de palma" or "ixtle de lechuguilla" became effective in Mexico on July 12, 1945. The rate of taxation is 0.25 pesos per kilogram or the equivalent of about 2-1/3 cents per pound. The decree is described in its preamble as an effort

to control the production and trade channels of the crop and to protect producers against market speculation and manipulation.

Exemption from the tax is provided for La Forestal, F.C.L., a semi-official organization created in 1941 to control production and exports of "ixtle de lechuguilla" through cooperative marketing. The exemption is effected by provision for a subsidy certificate issued to La Forestal for the amount of tax on its sales. The decree is planned thus in order to discourage the operation of producers not associated with the officially recognized and controlled organization for handling ixtle.

Production of ixtle in Mexico averaged about 59 million pounds annually during the 5 years immediately preceding 1940, and has increased substantially during the war years. Ixtle is not cultivated. Because it is gathered wherever it is found along roadsides or in open fields, it is available to persons in the lowest-income group, many of whom are entirely dependent upon the crop for their livelihood. These people are expected to benefit from the new law when they sell their ixtle cooperatively through La Forestal.

WEEKLY COTTON PRICES ON FOREIGN MARKETS

COTTON: Price of certain foreign growths
and qualities in specified markets

Market location, kind and quality	Date: 1945	Unit of weight	Unit of currency	Price in: foreign currency	Equivalent U.S. cents per pound
Alexandria (spot)	:	Kantar	:	:	:
Ashmouni, F.G.F.	7-19	99.05 lbs.	Tallaris	35.50	29.65
Giza 7, F.G.F.	7-19	99.05 lbs.	Tallaris	40.25	33.61
Karnak, F.G.F.	7-19	99.05 lbs.	Tallaris	39.00	32.57
Bombay (July '45 futures)	:	Candy	:	:	:
Jarila	7-20	784 lbs.	Rupee	414.00	15.91
Bombay (spot)	:	Candy	:	:	:
Kampala, East African ..	7-20	784 lbs.	Rupee	850.00	32.66
Buenos Aires (spot)	:	Metric ton	:	:	:
Type B	7-21	2204.6 lbs.	Peso	1300.00	17.56
Lima (spot)	:	Sp. Quintal	:	:	:
Tanguis, Type 5	7-21	101.4 lbs.	Sol	105.00	15.93
Recife (spot)	:	Arroba	:	:	:
Mata, Type 5	7-20	33.07 lbs.	Cruzeiro	80.00	13.17
Sertao, Type 5	7-20	33.07 lbs.	Cruzeiro	85.00	13.99
Sao Paulo (spot)	:	Arroba	:	:	:
Sao Paulo, Type 5	7-20	33.07 lbs.	Cruzeiro	89.00	14.65
Torreón (spot)	:	Sp. Quintal	:	:	:
Middling, 15/16"	7-21	101.4 lbs.	Peso	90.50	18.37
	:	:	:	:	:

Compiled from weekly cables from representatives abroad.

LIVESTOCK AND ANIMAL PRODUCTSCANADA REIMPOSES EXPORT RESTRICTIONS
ON SHEEP AND LAMBS

Live sheep and lamb exports from Canada were again made subject to export permits beginning July 6. This present restriction will result in an immediate cessation of shipments of market and feeder sheep and lambs to the United States. The resumption of controls by the Canadian Government on exports of these animals accompanied the new meat rationing program, which is designed to permit larger shipments of meat to the United Kingdom and liberated countries during the coming months. As higher prices generally prevail in United States market than in Canada, sheep and lambs would tend to move here if exports were uncontrolled.

Exports of live sheep and lambs, other than breeding stock, from Canada were first prohibited late in 1942, but from September 29, 1944, exports were permitted to the United States and British Empire destinations in order to avoid an oversupply of lambs on Canadian markets. Movement to the United States, principally from Manitoba, Ontario and Quebec, in that order of importance, totaled 137,000 head during the last part of 1944. In the first half of 1945 (January 1-July 5) exports were also large, amounting to 92,000 head.

EXPANDED PACKING INDUSTRY
PLANNED IN BOLIVIA

A plan that may enable the Bolivian consumer to get more meat to eat at less cost than at present, has been drawn up by the Bolivian Development Corporation. An expenditure of 2 million dollars for expansion of packing, processing, and refrigeration facilities, the plan estimates, would be required in order to utilize Bolivian cattle production to the best advantage.

At present there are only 2 refrigerated cars which ply between Argentina and the Altiplano, but they carry only a very small percentage of meat consumed within the country, and such shipments as they do carry are Argentine importations. Meat imports in 1943 totaled (bolivianos 115 million) \$2,680,000.

In Bolivia, the annual consumption rate for meat of 19 pounds per person, 16 pounds of which consists mainly of beef, is one of the lowest of any country in the world, it is stated, despite the fact that Bolivia has 1.6 million head of cattle for a population of 3.7 million people. The general lack of meat in the Bolivian diet, arises not from a shortage of meat within the country, but from losses due to lack of transportation, as cattle must be driven on the hoof many miles from the Beni to central markets, and to the high cost of meat when it finally reaches the market.

The greater part of Bolivians can afford little meat. While in the

cattle zones of the country, cattle on the hoof may sell for 1 cent a pound, by the time the meat gets to the areas of consumption it ranges between 11 cents and 12 cents per pound.

With well over 1.6 million head of cattle in Boliva, cattlemen state that annual reproduction is considerably in excess of 25 percent, indicating that 400,000 head could be made available to consumers annually if given proper transportation and distribution. This would mean 52 pounds of meat per person per year, in contrast with the present rate of consumption, based on available statistics, of only 19 pounds. These figures are based on an average dressed weight of 485 pounds per head of cattle. Beef is used as the working basis. Assuming that the Indian population which represents about 60 percent of the total, will use only about 33 pounds per capita each year, it would leave the balance of the population, with about 81 pounds per capita.

KENYA SEEKS EXPORT MARKET FOR SURPLUS BACON

Unless an export trade in bacon is developed in Kenya Colony, a cutback will be necessary in the expanded war output of the hog industry. The surplus during the war years was used for the Army both in British East Africa and overseas, but the military demand has already diminished.

Those interested in promoting the bacon export trade point out that Kenya is well situated for the production of bacon hogs and ought to be able to export at present world prices. The transport of hogs or bacon to the coast and to overseas destinations could be scarcely as expensive as the transport of large quantities of grain imported for feed into Denmark and the United Kingdom.

Kenya Colony, on the east coast of Africa, has potentialities as a hog raising country. While the present output of the industry is relatively small or only 40,000 head per year, the country has ample supplies of cheap feed grains and animal protein supplements in the form of skimmed milk and meat meal for a greatly expanded industry.

Two bills were passed by the Kenya Legislative Council during May 1945, providing for the setting up of a central organization for marketing and improving the standard of hog products and furthering the industry. One bill establishes a Pig Industry Board and the other provides for the constitution of the Uplands Bacon Factory (Kenya) limited, which is to be turned back to private ownership after being Government owned for 4 years.

The Board will have a monopoly of buying and selling hogs for consumption, will license pig producers (subject to appeal), and may refuse to grant licenses for new bacon factories. It may close factories (subject to right of appeal) and will be empowered to recommend that the Kenya Government impose a tax on all hog supplies. The Kenya Industry

Board was established to legally force, if necessary, up to 75 percent reduction upon all producers, unless a new outlet for hogs is developed.

The Kenya Pig Control was established in early 1941 and required that all pigs in the country sold for consumption must be sold to the Uplands Bacon Factory, control of which was assumed by the Kenya Government. Of the 130,400 pigs accepted by the Kenya Pig Control during the 4 years 1941-1944, only 5 percent came from African producers, the greater share coming from European producers.

PARAGUAYAN GRAZING CONDITIONS IMPROVE

The condition of cattle in Paraguay is much improved over last year with the average live weight for steers purchased by freezing companies reaching between 750 and 772 pounds, compared with 750 pounds a year ago. The continued drought is having the effect of lowering slaughter weights somewhat as compared with those earlier in the year. Purchases of cattle by freezing companies from Argentina, as well as by local sources, have been larger than anticipated. Imports of Argentine slaughter cattle for the year are expected to reach 90,000 to 100,000 compared with imports of 64,000 in 1944.

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OFFICE OF FOREIGN AGRICULTURAL RELATIONS
WASHINGTON, D. C.

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